

2022 Agent Training

New Agent Portal Training Agent Webinar





Objectives

Today's Objectives

This webinar introduces you to the new TWIA Agent Portal. After today's webinar, you will learn:

Why TWIA is changing their system

How these changes will impact TWIA Agents

The impact to policyholders

Today's Objectives

Logging in to the new system

Basic system navigation

How to submit a new business application

Activities/Uploading Documents

Locating Documents Customer Engage

Policy Changes

Cancellations

The Policyholder Payment Site

Renewals



Objectives

Why is
TWIA
changing
their
system?

TWIA is moving to an updated and flexible system that gives agents a more streamlined application process with enhanced communication and maintenance capabilities.

Additionally, this will allow TWIA to easily make system changes and improve our business processes.



Applications

- Streamlined navigation
- Offer packet will generate for new business *and* renewals
- Integration of MSB for residential policies

Payment Plans

- Full, 2, and 4 payment options
- 10 payment option for policyholder (automatic payment required)

Renewals

- Existing policies will migrate to new system 60 days prior to renewal date

Seamless Self-Service

- Simplified, organized access to policy information, making it easier to track status of quotes, renewals, cancellations, billing, and payments
- Self-service book of business reporting and commission statements

System Compatibility

- Guidewire downloads no longer needed
- Most web browsers supported

New Agent Portal Deployment Timeline

April 18, 2022

- New Agent Portal deploys
- ALL new business applications entered after this date will utilize the new system

Mid May 2022

- Renewals with an effective date of July 17, 2022, will initiate migration into the new system

Mid-2022 to Mid-2023

- Policies continue to migrate into the new system until the agency's entire book of business is in the new system





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Old System & New Portal Log in



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- Windstorm Certification
- About Us
- Login

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Agent Login

We have introduced a new portal for agents. All new applications must be submitted in the New Agent Portal. Renewing policies will migrate into the new system as they approach their renewal date. During this year-long transition period you may need to continue to manage policies in both systems.

To learn more, please visit the [TWIA Agent Training Center](#).

OLD AGENT PORTAL

LOG INTO THE OLD AGENT PORTAL

Use this system to manage:

- Policies issued or quoted before April 18, 2021
- Renewals effective before July 18, 2021

NEW AGENT PORTAL

LOG INTO THE NEW AGENT PORTAL

Use this system to manage:

- All new applications
- Renewals effective on or after July 18, 2021

EFT [No change]

- Full pay only
- Draft from Agent acct
- Agency must be enrolled

eCheck

- Full, 2 Pay, or 4 Pay
- 1st Payment made by Agent
- Draft from PH account
- Additional payments made by PH

TWIA Payment Options

Insured Direct Pay

- Full, 2 pay, 4 pay or 10 pay*
- *Only PH can pick 10 pay from Policyholder Portal (requires auto-draft)
- All payments made by PH

Mortgagee Escrow or Premium Finance

- Full Pay



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Live Demo

1. **Logging in to Agent Portal**
2. **Agent Dashboard**
3. **NB Submission**
4. **Locating & Uploading Documents**
5. **Policyholder Portal & Payment (New 10 pay)**
6. **Policy Changes**
7. **Cancellations**

Renewal Migration Timeline

60-35 Days Prior to Renewal Date

- Agents can make changes to the Renewals
- Renewals with an effective date of July 17, 2022, will initiate migration into the new system
- Migration continue until entire Agency Book of Business migrates

35 Days Prior to Renewal

- The Renewal Offer goes out to the Policy Holder and Mortgage Company on file

Up to Ten Days after Renewal Date

- Payment is applied to hold the renewal date
- Day 11 – 30 If a payment is received in this timeframe, policy will issue based on the payment received date

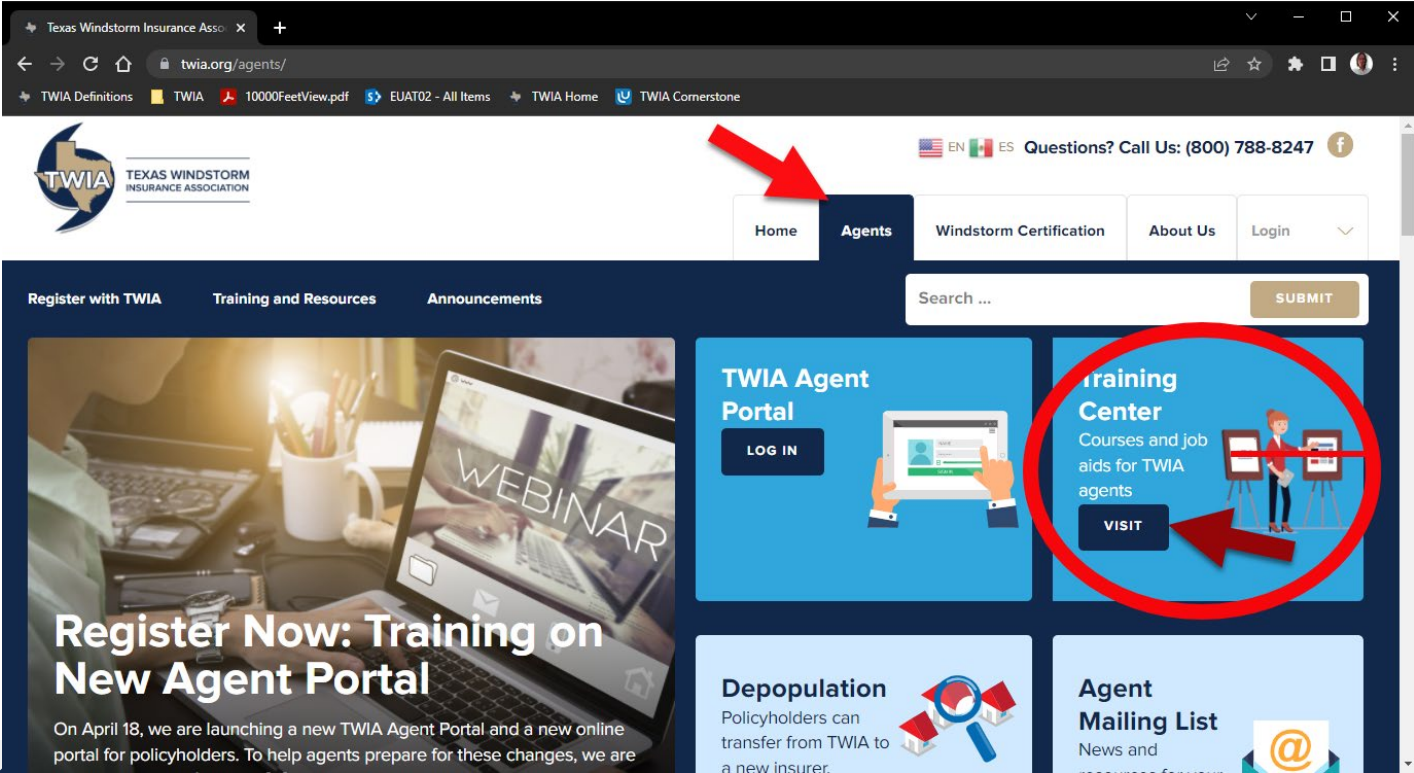




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TWIA Agent Training Center

twia.org/agents/training/



★ Job Aids

★ CBTs
[Video Tutorials]



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TWIA Agent Training Center

Access inside the Agent Portal

The screenshot shows the TWIA Agent Portal dashboard. At the top, there is a search bar, a "Start New Quote" button, and a "Help" menu. Below this is a navigation bar with links for Accounts, Policies, Claims, Activities, Commission, Administration, and Book Of Business. The main content area is titled "Dashboard" and includes a filter dropdown set to "Everything". There are four summary cards for "OPEN QUOTES", "OPEN POLICY CHANGES", "OPEN CANCELLATIONS", and "OPEN RENEWALS", each showing a count of 0. Below these is a section for "Your Open Activities" which currently shows "No Activities found." On the right side, there is a "Welcome" message box with a red border and a red arrow pointing to it. The message reads: "Welcome For training guides and additional resources, please visit our [resource center](#)". Below the welcome message is a social media feed for TWIA with three posts. At the bottom right, there is a Facebook widget for "Texas Windstorm I..." with 1.5K likes.



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A Week After We Go Live

Bring your questions!

Tuesday, April 26, 10:00 – 11:30 a.m.

Thursday, April 28, 2:00 – 3:30 p.m.

**Elevate Town Hall
Sessions**

LIVE Q&A

**Look for Your Invitation
Coming Soon!**